Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Voluntary Report - public distribution

Date: 12/11/2000

GAIN Report #BE0034

Belgium/Luxembourg

Market Development Reports

Private Labels in Belgium/Luxembourg

2000

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Report Highlights:
The private label market in Belgium and Luxembourg show significant signs of growth in the future. Growing awareness and purchasing of private label products are presenting opportunities for the private label market in Belgium to expand and diversify. Many shoppers would like to see a wider variety of private label goods, especially in the most popular ranges and would be supportive of their supermarket chain taking a lead in bringing out new products and offering more value for money.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
The Hague [NL1], NL

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BACKGROUND TO THE REGION

European Union

Growing from six Member States in 1952 to 15 by 1995, the European Union today represents more than 370 million consumers from the Arctic Circle to Portugal, from Ireland to Crete. Though rich in diversity, the Member States share certain common values. The Member States are: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Luxembourg, Italy, Portugal, Spain, Sweden, the Netherlands and the United Kingdom.

A major objective of the European Union is to create a single market. Harmonization of legislation is an important component of the single market. The legislation is made up of regulations and directives. Regulations must be implemented by each Member State while directives must be tincorporated into each member state's own national legislation. The harmonization of food legislation is not yet completed and this means that exporters to Europe always have to check their product formulation and labeling for compliance with national legislation in the member state to which they export to. Also, exporters to Europe, should be aware that despite the cooperation within the European Union, the member countries remain very different, concerning business etiquette, culture, tastes, preferences and language.

Benelux

Belgium, the Netherlands and Luxembourg situated in the northwestern part of Europe. All three countries are member states of the European Union. In addition they cooperate in a number of matters, standardizing certain regulations as the Benelux. The Benelux preceded the European Community which was founded in 1957. The name Benelux is nowadays also often used as a geographic indication. The cooperation between Belgium and Luxembourg is even greater because these two countries have a monetary union. All three countries are monarchies with a parliamentary democracy. Belgium is a federation consisting of three parts: Flanders (Dutch speaking), Wallonia (French speaking) and the Brussels region. The countries have a legal system of their own which is partly harmonized within the regulations of the European Union.

Until the introduction of the Euro on January 1st, 2002 the new European Union currency until that time the Benelux countries will use their own currencies: the Dutch Guilder, the Belgian Franc and the Luxembourg Franc. In this market brief the values as of August 1st, 2000 are used: 1 Dfl = 0.4194 US$ and 1 Bfr / 1 Lfr = 0.0229 US$; 1 Dfl =0.4537 EURO and 1 Bfr/ 1 Lfr= 0.0248 EURO.

Europeans speak many different languages. The people in the Netherlands speak Dutch. Many people in the Netherlands also speak one or more other languages, e.g., English, German or French. Belgium has formally three official languages: In the North and West of the country (this part is called Flanders) Flemish is the mother tongue, a Dutch dialect. In the south and east people speak French. In the east there is a small part of the country where German is the official language. The Luxembourg population speaks a dialect which is a mixture of the two official languages in this small country: French and German. The Benelux is no homogeneous block, especially concerning "cuisine" buying patterns, etc. Success in the Netherlands is no guarantee for success in Belgium/Luxembourg, and vice versa.

KEY FIGURES OF BELGIUM AND LUXEMBOURG

Demographic Characteristics

The total population of Belgium is 10.2 million persons. There are 334 Belgians per km2. Of the 4.2 million households, 1.1 million are single persons. This number is expected to grow due to population aging, children leaving the home earlier and increasing divorce levels. Average household size is 2.5 persons. The largest cities are Brussels (1million inhabitants), Antwerp (500,000) and Gent, Charleroi, Liege (all approximately 200,000). Brussels is also the capital of the European Union. Luxembourg is a mini state (Duchy) with about 423,700 inhabitants, most of whom live in and around Luxembourg City.

Economic Developments

The Belgian economy is expected to grow by 2.9 percent in 2000 compared to 1.7 percent in 1999. Household disposable income should increase by 2.5 percent compared to 1.7 percent in the preceding year. Unemployment is a major problem, with 10.1 percent of the work force out of a job. Inflation is increasing slightly, now at around 1.5 percent. The percentage of disposable income spent on food has continued to fall, from 16.6 percent in 1995 down to 16.0 percent in 1998. However, total food expenditure grew by 2.1 percent to US$ 14.44 billion in 1999, of which US$ 14.35 billion was spent in supermarkets .

Belgian Retail Structure

In 1999 the total number of supermarkets in Belgium decreased by 844 to 10,676 stores. Especially smaller food retailers have declined drastically from 10,325 stores in 1996 down to 8,343 stores in 1999. Winners have been the large supermarket chains dominated by GIB, Delhaize 'Le Lion', Louis Delhaize and Colruyt. The number of discount stores, especially those owned by Lidl, has also grown remarkably. In Belgium, about 52 percent of food sales take place in large supermarkets, 24 percent in smaller supermarkets, 14 percent in discount stores and 9 percent in small local shops.

The Five Largest Food Buying Organizations in Belgium in 1999			
Retailer/Wholesaler - type of outlet	**Market share**	**Number of Outlets**	**Purchasing**
GIB., Buying organization for supermarket chains Maxi GB, Super GB, Super GB Partner, Contact GB, Unic and Nopri	US$ 3.9 billion 25.5 percent	527	Direct, Imp./ wholesaler
Delhaize Le Lion, Buying organization for supermarket chains Delhaize Supermarchés, AD Delhaize, Supérettes Delhaize and Delhaize 2	US$ 3.1 billion 20.0 percent	363	Direct, Imp./ wholesaler
Louis Delhaize, Buying organization for supermarket chains Match, Profi, L Delhaize and Cora	US$ 2.0 billion 13 percent	554	Direct, Imp./ wholesaler
Colruyt, Retailer	US$ 1.9 billion 12.5 percent	140	Direct, Imp./ wholesaler
Aldi, Retailer	US$ 1.5 billion 9.7 percent	290*	Direct, Imp./ wholesaler
IN TOTAL	**US$ 12.5 billion 80.7 percent**	**2,333***	**Direct, Imp./ wholesaler**

Source: CBD, 2000 and Marketing Map, 2000
Note: Ag Affairs estimate based on Marketing Map, 2000

In Luxembourg, the most important retailers are “Match” (13 stores, 40 percent share) and “Cactus” (16 stores, 40 percent share) in 1998. French retailers, such as the very aggressive “Intermarché” and “Auchan,” are expected to increase their presence strongly throughout Belgium and Luxembourg.

DEVELOPMENT OF PRIVATE LABEL

Private Label in Europe

Europe is still by far the most important continent for private label, both in terms of volume and value. Store brands are a way of life in Europe where they have eroded away at the market share of respected brands. However, sales of private labels differ strongly when the continent is divided into regions. Europe’s most important region in terms of private label is Western Europe. With a turnover of US$ 232.4 billion, Western Europe accounted for more than 83 percent of all private label sales in Europe in 1998. Within Western Europe the United Kingdom, led by such dominant food retailers as Tesco and Sainsbury which have invested heavily in private label use over the years, is leading the way. The high level of competition between the grocery multiples and the high penetration of non-food private label retailers such as Marks & Spencer and Boots are responsible for the accelerated growth.

With up to 20 percent or more in some categories, private labels have become more than just a low-priced alternative for Name brands. In fact, they have included more and more into value added products. They are sign of quality which gives extra profile to the supermarket formula. This success has come a long way. It took private labels more than 20 years to find their current place in the market. Nowadays European supermarkets target different segments of their customer base with differentiated private label products to help maintain customer loyalty. The most premium items usually bear the name of the store. Specialties that target local or regional tastes comprise another segment. Economy lines like “Euroshopper” often cut several European countries, offering a budget line for good value.

Common consumer attitudes toward private label products in Europe are:

1. Younger age groups are more likely to buy private label products; will buy a large number of private label products in the future; are more aware of private label products; are less likely to buy manufacturers' brands; and are more likely to consider some private label offerings to be better than others
2. Shoppers would like retailers to take a leading role in private label products
3. Shoppers would like to see a wider variety of private label products particularly in bottled, jarred, canned or tinned products and dairy products
4. Two fifths of consumers recognize that some supermarket chains have better private label products than others in terms of quality, taste, freshness and overall value for money
5. Quality, taste, freshness and overall value for money are the most important factors to the private label shopper
6. While the majority of consumers are satisfied with current manufacturers' brands, some weaknesses in specific product areas are identified in bottled, jarred, canned or tinned products and dairy products

In general, private labels are strongest in those categories to which the consumer attaches the least emotional value. The average price of a private label is approximately 30 percent lower than a comparable Name brand. In Germany, Belgium and Austria private labels are comparably the cheapest, approximately 40 percent lower than the price of the Name brands. In Germany for example discounters like Aldi and Lidl have strong market positions.

Private Label Market Share by Country (%)

	Volume			Value		
	1998	**1999**	**Diff.**	**1998**	**1999**	**Diff.**
United Kingdom	45.2	45.4	0.2	43.6	43.5	-0.1
Belgium	34.8	34.7	-0.1	25.9	26.0	0.1
Germany	31.6	33.2	1.6	26.1	27.4	1.3
France	21.0	22.1	1.1	18.1	19.1	1.0
The Netherlands	21.1	20.6	-0.5	18.9	18.4	-0.5

Source: AC Nielsen, 2000

Although private label growth has been strong in Europe in recent years, there are no signs that the pace will slow down. On the contrary, growth is still accelerating and is expected to outperform the retail sector as a whole in the coming years. Euromonitor forecasts a 26 per cent growth of all private label sales in Europe between 1997 and 2002. Growth of non-food private labels will outstrip those of food (58.2 percent compared to 7.3 percent). On the whole, private label will achieve a 13.9 percent share of all European retail sales by 2002. However, considerable differences exist between Northern and Southern Europe. In Northern Europe, where the supermarket structure is more or less fully developed and the trade is very concentrated, the share of private labels has pretty much stabilized. In some countries the share of private labels is even dropping, like the Netherlands. Southern European countries are quickly catching up to the North.

The total share of private labels in a country depends on different factors. Wherever commercial concentration is developing, the share of the private label is growing. The assortment choices supermarket chains make also influence the total share of private labels in a country. Further on, the share of private labels is influenced by whether or not an A-brand is present in a certain market. Often, in a market where three large A-brand manufactures are dominant, retailers do not launch a private label concept.

The following trends will impact European private label products sales and innovation**:**
- Organic foods are going mainstream
- Convenience in the chilled sector is desired
- Short-life and high-margin food products are in
- Healthy and functional food sales are rising

Future prospects for private label foods are strong in the following categories:
- Functional foods (dairy, breakfast food, soft drinks, pet food)
- Organic and natural foods
- Convenience foods
- Full-fat, full-flavored foods
- Dietary supplements

In spite of the strong attraction of private label in Europe, grow potential can only be utilized when retailers offer a broad variety of good quality and innovative privat label products. The key is to establish relationships with major supermarkets and develop products in cooperation with them. Retailers should also support their supermarket formula by powerful marketing campaigns and merchandising.

Private Label in Belgium and Luxembourg

In 1999, Belgium was second in private label market share after the United Kingdom and followed closely by Germany. Private label sales had a 34.8 market share in value and therefore accounted for about one of every three products sold. Private label's volume share advanced in dry grocery, while alcoholic beverages, dry grocery and frozen led value increases.

Since 1997 supermarket chain "Delhaize 2" has opened more than 25 stores in Belgium. Almost all products offered are private label, like food retailers Aldi, HEMA and Marks & Spencer. The emphasis is on convenience products, with a large number of the 3,500 stocked items in the area of pan-ready foods and ready meals.

Increased awareness and a strong positive image of private label have increased buying in Belgium. More than half of the customers say that they frequently buy private label products. Moreover, one in five consumers says that they are more likely to buy private labels than a year ago.

According to MORI growing awareness and purchasing of private label products are presenting opportunities for the private label market in Belgium to expand and diversify. Many shoppers would like to see a wider variety of private label goods, especially in the most popular ranges and would be supportive of their supermarket chain taking a lead in bringing out new products.

Private label market share by department in Belgium (%)

Department	Volume			Value		
	1998	1999	Diff.	1998	1999	Diff.
Dairy	42.3	42.2	-0.1	31.7	31.7	0.0
Frozen	57.1	57.9	0.8	47.2	47.8	0.6
Dry Grocery	40.6	41.5	0.9	30.6	31.3	0.7
Confectionary	23.1	20.3	-2.8	16.5	15.0	-1.5
Bakery and Biscuits	34.5	34.3	-0.2	26.9	26.9	0.0
Hot beverages	41.9	41.3	-0.6	34.7	32.9	-1.8
Non-alcoholic beverages	41.7	42.5	0.8	28.7	29.2	0.5
Alcoholic beverages	24.1	23.4	-0.7	17.7	17.1	-0.6
Pet food	51.4	51.0	-0.4	38.7	38.5	-0.2
TOTAL MARKET SHARE*	**34.8**	**34.7**	**-0.1**	**25.9**	**26.0**	**0.1**

Source: PLMA, 2000

Note: Total market share includes also the departments household, paper products, and health & beauty products

Top product categories in Belgium in 1999 (%)			
Volume		**Value**	
Product	**Market Share**	**Product**	**Market Share**
Coffee creamer	88.0	Coffee Creamer	75.8
Gherkins	80.6	Trail mix (nuts)	75.5
Nic nac biscuits	73.6	Frozen seafood and snails	74.0
Canned vegetables	72.3	Frozen meat/poultry	65.6
Milk	72.2	Canned vegetables	65.1
Frozen seafood and snails	71.2	Milk	62.4
Trail mix (nuts)	70.4	Gherkins	61.9
Frozen meat/poultry	69.8	Nic nac biscuits	61.7
Vegetables in jars	67.4	Vegetables in jars	58.3
Fruit compotes	67.1	Fruit compotes	57.0
Onions	67.1	Frozen fish	57.0
Frozen vegetables	64.8	Capers	54.7
Frozen potatoes	64.6	Nibbles	54.0
		Fruit juice	52.4

Source: PLMA, 2000

Gainers in Market Share in Belgium in 1999 (%)			
Volume		**Value**	
Product	**Share**	**Product**	**Share**
Sausages canned/jar	11.5	Other types of chocolate	19.9
Other types of chocolate	9.4	Capers	9.5
Capers	8.8	Sausages canned/jar	7.5
Onions	7.8	Cheese with mouldy rind	7.2
Genever	7.6	Onions	6.7
Spices	7.3	Preserved vegetables in vinegar	6.5
Preserved vegetables in vinegar	7.1		

Source: PLMA, 2000

EXPORTER BUSINESS TIPS

General Information

Due to the concentration of buying power in Europe U.S. manufacturers will have to consider supplying larger quantities, possibly private labels, and dealing with fewer buyers. The introduction of the EURO is likely to complicate this picture. On the one hand, regional, local differences in tastes and preferences can be expected to continue, even in Belgium and Luxembourg. On the other hand, prices may equalize through more controlled and sophisticated electronic purchasing and distribution system. To develop ties with European retailers, U.S. firms must have a warehouse and/or distribution facility in Europe to handle the small and frequent orders (stores are usually much smaller than in the U.S.). Securing that facility, of course, requires financial commitment to the market.

In Europe the U.S. enjoys a positive image in Europe, particularly among the younger generation. Although, the American colors (red, white and blue) are a draw and can help marketing and promotional efforts, they may also "color" consumer expectations. American foods do not always enjoy a "fine cooking" or "haute cuisine" reputation. In addition, American manufacturers may face some subtle or implied biases. Europeans are more disposed to buying their own products, believing them to be of higher quality than American foods.

The Private Label Manufacturers Show

As of now, few American manufacturers have ventured systematically into the concentrated retail sector of Europe. And fewer have discovered the annual Private Label Manufacturer (PMLA) Show. The show has been held in Amsterdam, the Netherlands for over a decade, and has grown into a significant, highly specialized show. PLMA restricts exhibitors to manufacturers and exclusive agents, and targets retailers/supermarket buyers as visitors. In 2000, the show has more than 2,700 exhibit stands representing manufactures from more than 50 countries. There were a few U.S. exhibitors, but American themes and tastes were notably present. The PLMA show is a good venue to find partners in Belgium and Luxembourg provided your company:

- Has innovative/novel products that are price competitive
- Has sufficient capacity and flexibility to adapt a product to European tastes
- Is flexible enough to meet European distribution and financing requirements
- Has the ability to develop warehousing/distribution facilities or contacts

The PLMA show is organized by the Private Label Manufacturers Association
For more information on shows and private labels in general, please contact:
PLMA International Council
World Trade Center
Strawinskylaan 671
1077 XX Amsterdam
The Netherlands
Tel: +31 20 575 3032
Fax: +31 20 575 3093

FOOD STANDARDS AND REGULATIONS

Labeling Requirements

In general labeling must not be misleading. The following information must be on the label:

- The name of the product
- List of ingredients in descending order of weight
- Net quantity in metric units (suggested, not required)
- The date of minimum shelf life
- Special storage conditions or conditions of use
- The name of the "sender"
- Instructions for use (if necessary for appropriate use)

Many manufacturers also provide nutritional values on their packaging. This is obligatory when a nutritional claim is used on the label. There are specific, detailed regulations for all of the points made above. These regulations may differ from country to country within the EU and should be studied before finalizing packaging. All the information mentioned above must be given in the language or the languages of the region in which the product is to be sold. This means that in Belgium all packaging must be in both French and Flemish (Dutch).

Other Regulations

Besides labeling requirements, there are also regulations regarding inspection and sampling, food-additives, flavorings, pesticides and other contaminants, control and hygiene, radioactive contamination, products in contact with foodstuffs, provenance and origin and packaging and packaging waste. As mentioned before, these regulations are only partly harmonized within the EU. Most importers are well informed about these subjects.

FAIRS

Belgium and Luxembourg follow EU policy in regard to labeling and ingredient requirements. More detailed reports which specifically address labeling and ingredients requirements in and Belgium & Luxembourg can be obtained from the FAS homepage: http://www.fas.usda.gov .The reports are entitled Food and Agricultural Import Regulations & Standards (FAIRS).

Tariff Regulations and Requirements for US Exporters

The EU common customs tariff classification, import duty, VAT (value-added tax) and import certificates are an important but complex area for export into Europe. Import companies and transport companies with customs declaration facilities can assist you. For all regulations the tariff classification by HS (Harmonized System)-code (six digits) of products within the international Nomenclature is relevant. To determine the customs tariff for your product, please contact:

For Belgium and Luxembourg:
Customs Office Ministry of Finance
Attn. Mr. J.P. Couder
Tel: +32 2 210 3286
Fax: +32 2 210 3313

KEY CONTACTS AND FURTHER INFORMATION

Foreign Agricultural Service (USDA)

For Belgium and Luxembourg:
American Embassy,
Office of Agricultural Affairs,
c/o Agricultural Specialist
Boulevard du Régentlaan 27,
B - 1000 Brussels
Tel: +32 2 508 2437
Fax: +32 2 580 2148

Short List of Importers of U.S. Foods in Belgium and Luxembourg

FLAVORS OF THE WORLD
Contact: Ms. Karin Dhadamus, Managing Director of **KD TRADING**
Passage du Nord- Noorddoorgang 14-18,
B-1000 Brussels
Tel: 32(2) 217.71.00
Fax: 32 (2) 217.71.00 (same as tel.)
Email: Flavors.World@Skynet.be

Products*: Consorzio (flavored oils & vinegars, Pavla's Dressings, Terra Chips, Brent & Sam's (chocolate chip cookies), El Paso (salsas, spicy sauces), Patsy's (pasta sauces), Harvey & Sons (teas), Urban Accents (Spices).*

Type of Company: Importer/Wholesaler
Annual Turnover: ± 3 million BF
Number of Employees: 2
Date of Company Established: 1996

GRARE - American & Mexican Food Store
Contact: Mr. Alain Roggen, Director
Prins Boudewijnlaan 175
B - 2610 Wilrijk
Tel: 32 (3) 449-4118
Fax: 32 (3) 449-4118
Email:N/A

Products*: specializes in U.S. & Mexican food, U.S. wines, kosher food, beers, spices, etc. Beers: Bud beer, Dixie/Louisiana, Rolling Rock, Michelob, Labatt, Corona, Tecate. Rootbeers from the US: Shoppers Value, Weight Watchers, IBC, General Foods/Kraft, General Mills, Nabisco, Old El Paso, Procter & Gamble.*

Type of Company: Importer/Wholesaler/Retailer
Annual Turnover: N/A
Number of Employes: 1
Date of Company Established: 1962

ZENOBIA Int.
Contact: Mr. Cosse, Director
Rue du Grand Cortil 17
B - 1300 Wavre
Tel: 32 (10) 22-2394
Fax: 32 (10) 22-2799
Email: N/A

Type of Company: Importer/Distributor/Wholesaler
Annual Turnover: N/A
Number of Employees: N/A
Date of Company Established: 1945

Products*: Partial list of US products: Devonshire croutons, Ocean spray cranberry products, French mustard, Royal Prince jams, Festal pumpkin, Crisco shortening, Pam dry fry spray, Mom's jiuces, Doxsee clams products, Dr. Pepper drink, Barel Head Root beer, Knox gelatine, Hunt & Wesson beans and sauces, La Choy chinese food, Jack rabbit beans, Jolly time popcorn, Chelten house sauces, Paul Newma fine foods, Super snax chips, Karo corn syrop, Happy Jack pancake syrup, Grandma molasses, Smuckers jams and jellies, Durkey marshmallow fluff, Fairco marshmallows, Peter Pan peanut butter, Nutcracker peanuts, mixex nuts and cashews and pistachios, Kretchmer wheat germ, Arm & Hammer Baking soda, Davis baking powder, Nershy chocolat, Pillsburry flour, Bakers coconut flakes and baking chocolat, La Preterida Mexican food, Lawry's spices, Jurkey extracts, Pie fillings, Sunshine crackers, Nabisco cream of wheat, College Inn chicken and beef broth, Ragu sauces, Gen. Mills cerials, Royal Cherry Marachino cherries, B&G Sweet relish & kosher dills, Tootsie confection, Old El Paso chili con carne, US Rootbeer: Barelhead.*

BLEUZE N.V.
Contact: Mr. J.B.R. de Zwart, Manager
Rue Golden Hope 35
B - 1620 Drogenbos
Tel: 32 (2) 331-1500
Fax: 32 (2) 331-0033
Email: N/A

Type of Company: Importer
Annual Turnover: 200 million BF
Number of Employees: 1
Date of Company Established: 1938

Products*: Trappey's pepper sauce, Bigelow's herb teas, Californian wines*

Q.M. BVBA
Contact: Mr. Frank Vaerewijck, Director
Scousele 30
B - 9140 Temse
Tel: 32 (3) 711-0895
Fax: 32 (3) 711-0879
Email: Q.M.Annual Turnover@Innet.Be

Type of Company: Distributor
Annual Turnover: ± 300 million BF
Number of Employees: 1
Date of Company Established: 1965

Products*: Blue Diamond Almonds, Santa Cruz Valley Pecan, Campion Raisin, Setton Pistachio, Apex Fruit Juices, Cherry Central.*

DE JONGH - PELLENS BVBA
Contact: Mr. Erik T. De Jongh, Managing Director
Middelmolenlaan 172-174
B - 2100 Deurne
Tel: 32 (3) 324-6131
Fax: 32 (3) 324-6363
Email: N/A

Products*: Mariani Dried Prunes, RSP Water-Packed Cherries "Packers Pride", Blue Diamond Almond products.*

Type of Company: Importer/Distributor
Annual Turnover: ± 5 million BF
Number of Employees: 14
Date of Company Established: 1885

S.A. BISSCHOPS-VERACHTER
Contact: Mr. Daniel Bisschops**,** Director
Oudestraat 5
B - 2630 Aartselaar
Tel: 32 (3) 877-2260
Fax: 32 (3) 877-2367
Email: N/A

Products*: canned foods, almonds, pistachios, nuts and macadamia nuts (California Blue Diamond Co.), Alaska canned salmon.*

Type of Company: Importer/Distributor
Annual Turnover: ± 600 million BF
Number of Employees: 14
Date of Company Established: 1798

VAN HOVE BVBA
Contact: Mr. R.Van Hove, Director
Industriestraat 14
B - 2500 Lier
Tel: 32 (3) 480-6825
Fax: 32 (3) 480-6905
Email: N/A

Products*: Spague's Maple Syrup, barbecue sauces, Buffalo Bill's tortilla chips.*

Type of Company: Importer/Distributor
Annual Turnover: ± 155 miilion BF
Number of Employees: 14
Date of Company Established: 1956

HIRSCH & CO - GOURMET HOUSE-WILD RICE
Contact: Mr. Mike Kerremans, Director
A. Frankenstraat 8 Box 2
B - 2530 Boechout
Tel: 32 (3) 454-0682
Fax: 32 (3) 454-0879
Email: Mike.Kerremans@Ping.be

Products*: raisins, almonds, prunes, and canned cherries (Liberty Gold Co.), walnuts (Sun Diamond), frozen and canned salmon, Ligo (fruit), Ocean Angel Seafood, Seafood and dried fruit under byers brand.*

Type of Company: Importer
Annual Turnover: ± 11 miilion BF
Number of Employees: 1
Date of Company Established: 1901

TEAM INVESTMENTS
Contact: Mr. Adam Edwards, Director
Avenue Louise 50
B - 1050 Brussels
Tel: 32 (2) 511-4070
Fax: 32 (2) 511-7459
Email: Wherenithal@compuserve.com

Products*: H & H Bagels from NYC*

Type of Company: Importer/Distributor
Annual Turnover: N/A
Number of Employees: 1
Date of Company Established: 1993

BREWERY CORSENDONK
Contact: Mr. Sven Collyn, Product Manager Belgium
Steenweg op Mol 118
B- 2360 Oud Turnhout
Tel: 32 (14) 45-3372
Fax: 32 (14) 45-3388
Email: N/A

Products*: Bud or Anheuser Bush beer.*

Type of Company: Importer
Annual Turnover: ± 948 million BF
Number of Employees: 48
Date of Company Established: 1916

DELHAIZE FRERES & CIE "LE LION" SA
Contact: Mr. Van der Vliet, Director of Purchases
Broekooi 5
B - 1730 Zellik
Tel: 32 (2) 412-2501
Fax: 32 (2) 424-0292
Email: pvandervliet@delhaize-le-lion.be

Products*: pitted prines, large prunes, golden raisins, natural raisins, extra pink slamon Delhaize, fresh citrus fruits: grapefruit, oranges, limes, cherries, grapes and blueberries, nuts and peanuts.*

Type of Company: Importer/Distributor
Annual Turnover: 100 billion BF
Number of Employees: 12,800
Date of Company Established: 1868

BLOC S.C.
Contact: Mr. Jean-Paul Lecart, Director
Rue d'Artois 4
B - 1000 Brussels
Tel: 32 (2) 512-1640
Fax: 32 (2) 511-2289
Email: N/A

Products*: Salmon, Prunes, Raisins, Wine, Canned Fruits, Canned Vegetables, Peanuts.*

Type of Company: Importer
Annual Turnover: ± 3.9 billion BF
Number of Employees: 13
Date of Company Established: 1947

BIODYNAMICS NV
Contact: Mr. Francis Maes, Director
Joseph Plateaustraat 4
B - 8400 Oostende
Tel: 32 (59) 80-5824
Fax: 32 (59) 80-7083
Email: Biodynamics@pophost.eunet.be
Http://www.biodynamics-euronuti.com

Products*: Tylor encapsulations, ABCO, Healthcomm, Nutriwest vitamines & minerals & plantenzymes & herbs & amino-acins & glandulars.*

Type of Company: Importer/Distributor
Annual Turnover: ± 150 million BF
Number of Employees: 22
Date of Company Established: 1988